

PUBLIC INFORMATION & COMMUNICATION SERVICES (PICS)
NIH - TASK ORDER

RFTOP#129

TITLE: Curriculum Coordinator, Meeting Facilitator, and Evaluator for
Training Workshop

PART I – REQUEST FOR TASK ORDER (TO) PROPOSALS

Point of Contact Name: Anthony Revenis

Phone: 301-402-3073 Fax: 301-435-6101

Proposal Address:

6011 Executive Blvd., Room 529S
Rockville, MD 20892-7663

Billing Address:

Accounts Payable, OFM, NIH
Bldg. 31; Rm. B1B39
Bethesda, MD 20892-2045

B. PROPOSED PERIOD OF PERFORMANCE

One year from date of award. The award may be renewable for up to 4 option years if OLA staff determines that further curriculum and/or evaluation assistance directly related to the CARRA Training program is required. Proposals will not be evaluated based on this possible additional work.

C. PRICING METHOD

Time and Materials. Currently available funding for this project is limited to \$50,000. A firm that is able to complete this project for less than that amount is invited to propose a lower price for the successful execution of this task. If a firm determines that the budget amount is insufficient, they should advise how best to spend this amount and how much more is required to fully meet the objectives. Price will be a consideration in the determination of the firm that is selected for award.

D. PROPOSAL INSTRUCTIONS

Proposals should be submitted by e-mail to the above POC. Proposals should not exceed 20 pages (excluding resumes and references).

E. RESPONSE DUE DATE: Thursday, May 15, 2002 at Noon.

F. TASK DESCRIPTION:

BACKGROUND

The National Cancer Institute (NCI) is a component of the National Institutes of Health (NIH), one of eight agencies that compose the Public Health Service (PHS) in the Department of Health and Human Services (DHHS). In order to accomplish its mission to reduce the burden of cancer morbidity and mortality, and ultimately to prevent the disease, NCI supports a broad range of programs in basic and clinical biomedical and behavioral research and training. These include programs to understand the causes of cancer; prevent, detect, diagnose, treat, and control cancer; and disseminate information to the practitioner, patient and public.

In carrying out these programs, the NCI divisions and offices frequently work with consumer advocacy organizations, scientific and professional societies, and other Federal agencies. The Office of Liaison Activities (OLA) was established in 1996 to serve as the central point of contact at NCI for these key constituents of NCI. The office is responsible for communicating, cooperating, and collaborating with these groups to promote common goals. OLA supports two programs that involve consumer advocates in NCI programs and planning. One of them is the Consumer Advocates in Research and Related Activities (CARRA) program. Through CARRA, the NCI includes consumers in its scientific and communication activities such as grant review or publication development. OLA facilitates this process and matches advocates' skills and interests to NCI activity needs.

The CARRA program encourages people affected by cancer to provide their viewpoint and ideas directly to NCI staff so that NCI can incorporate this perspective into programmatic activities. OLA staff recruited consumer advocates to form a "ready and waiting" group of people who are available to participate in a wide range of NCI activities. CARRA members represent many different cancer types, age groups, and ethnic groups from across the Nation. In addition to participating in NCI activities, CARRA members represent the opinions of their groups and play critical roles as two-way information links between their own communities and constituencies and the NCI.

In order to prepare CARRA members to participate in the NCI peer review process, OLA is developing a CARRA Pilot Training workshop that will prepare these consumer advocates to work alongside scientists as peer review panelists. A Training Planning Group, composed of NCI scientists, OLA staff, consumer advocates (including CARRA members), and other NCI staff, has been meeting since October 2002 with the purpose of establishing learning objectives for, and developing a comprehensive pilot training workshop for CARRA members.

The CARRA Pilot Training will be a 2-day workshop in Bethesda, MD for approximately 20-40 CARRA members. The pilot training will prepare CARRA members to participate in NCI grant review activities. Some have participated in several grant review activities, while others have little or no experience with the NCI grant review process. OLA staff has determined that assistance is needed in three areas of developing the CARRA Pilot Training: 1) Curriculum Coordination, 2) Training Workshop Facilitation, and 3) Training Evaluation.

PURPOSE

The purpose of this Task Order is to obtain contract support for coordinating curriculum development for a pilot training to prepare CARRA members to participate in the NCI grant review process. Support is also needed for a contractor to act as a Facilitator for the two-day

pilot training workshop. Finally, contract support is needed to conduct a process evaluation of the pilot training.

PROJECT OBJECTIVES

1. Curriculum Coordinator

While the CARRA program is designed to provide advocates with opportunities to participate in various NCI research and related activities, the majority of requests from NCI staff are for CARRA members to participate in grant review. As a result, the Training Planning Group has decided to focus the training on the NCI grant review process. OLA staff and the Training Planning Group have developed six learning objectives for the CARRA Pilot Training:

- 1) Identify the expected roles and responsibilities of CARRA members in NCI program and grant review activities.
- 2) Effectively communicate the cancer needs and concerns of the general public, including those directly affected by cancer.
- 3) Describe the NCI's research mission, structure, and its extramural research activities.
- 4) Identify key technical and procedural aspects of the NCI peer review process.
- 5) Identify appropriate resources for locating current information on key cancer concepts.
- 6) Recognize key concepts and terminology of cancer research.

CARRA members have been surveyed to determine the importance of these objectives and their current level of knowledge pertaining to each objective. Survey results indicate that the learning objectives are on-target and each is important to be included in the CARRA Pilot Training. Learning content for the pilot training has been identified based upon these learning objectives.

Development of learning content for the CARRA Pilot Training has been a team effort using the skills and expertise of the Training Planning Group. A preliminary sequence and structure for the training has been drafted (see attached preliminary training plan). OLA believes that the next steps for curriculum development (organizing learning content into an effective sequence and instructional modalities) can best be achieved if someone not directly involved with NCI or with teaching the courses serves as a Curriculum Coordinator.

The Curriculum Coordinator would work with OLA staff to synthesize this content according to the needs and concerns voiced by the Training Planning Group. Advice is needed in order to incorporate effective learning modalities and adult learning principles into the pilot training workshop. This may include reviewing documents by email and attending 2-3 meetings of the Planning Group by teleconference in order to interact with advocates and NCI staff. It will also involve working with and advising instructors (NCI staff who will be identified by the Planning Group) on an individual basis about tailoring their content and teaching methods to be appropriate for adult learners. Ultimately, the Coordinator will ensure that the pilot training is designed to effectively meet the learning objectives that have been identified by the Training Planning Group.

Task Description:

The Contractor will provide training and adult learning expertise for the Training Planning Group and OLA as they develop a pilot training workshop to prepare CARRA members to participate in the NCI grant review process.

Deliverables:

- Serve as the Curriculum Coordinator and primary contact person for NCI staff who are identified by the Training Planning Group as course instructors. This will include:
 - Making recommendations to OLA staff and the Training Planning Group about effective structure and learning modalities for the training. This will include recommendations for training sequence, length of time spent in each content area, modalities (such as panel presentations, small groups, lectures, etc.), and other appropriate training considerations.
 - Arranging individual meetings with all instructors to advise them on the specifics of their presentations to ensure that content and training methods are appropriate for adult learners.
 - Making recommendations to instructors and OLA staff about appropriate training materials. Because NCI houses a wealth of knowledge, information, and expertise related to the grant review process, the Coordinator will familiarize him/herself with existing NCI resources including websites, current training curriculum, NCI publications, and NCI expertise in the form of individuals and departments which may be appropriate to include in the training. It is in the best interest of CARRA members to maximize the involvement of these existing NCI staff and resources in the training.
 - Collecting all presentation and training materials from instructors at least one month prior to the pilot training and providing these materials to OLA staff for approval.
 - Communicating with instructors to determine technical presentation needs such as microphones, projectors, wipe boards, flip charts, etc.
 - Notifying OLA staff about the technical needs of all presentations at least one month prior to the training.
 - Sending all necessary reminders (via email or telephone) to instructors at least one week prior to the training to ensure that they are present and aware of their role and time commitment, as well as the location and other logistics of the training.
- Attend 2-3 meetings of the CARRA Training Planning Group via teleconference or in person.
- Prepare an annotated agenda for the CARRA Training.
- Develop a "Training Binder" to be provided to each CARRA member who attends the training. This binder will include the training agenda, brief biographies of all instructors, all training materials, presentation notes, evaluation forms for each presenter or session (which will be developed by the Training Evaluator-see below), and any other necessary and appropriate materials for training attendees. A prototype for the format and contents of this binder will be provided to OLA staff at least one month prior to the training.

Please note: The contracting agency will not be responsible for duplicating the Training Binder or any other workshop materials. This service will be provided by an existing OLA meeting support contract.
- Present a written report presenting the overall training program and curriculum at least two weeks prior to the implementation of the pilot training. This report will explain how the recommended training curriculum is the most effective way to train CARRA members to participate in the NCI grant review process. It will document decisions made by OLA staff and the Planning Group in developing the training. This report will serve as validation of the proposed training and curriculum and will be used by the training evaluator to generate effective evaluation tools. It will also be used to familiarize the Training Facilitator with the pilot training.

- Coordinate one final compiled report including the written reports from the Facilitator and Evaluator (see below).
- Attend and serve as an additional resource to help facilitate the training while it is occurring (including the responsibility for ensuring the cooperation of all instructors).

Qualifications:

- Experience training and instructing adult learners, and an understanding of their characteristics and learning needs.
- Ability to synthesize and organize pre-determined training content into an effective training structure and sequence.
- Ability to assist instructors with developing content that is appropriate for achieving learning objectives.
- Experience designing curriculum-based training courses.
- Knowledgeable about NCI grant review process.
- Knowledgeable about consumer involvement issues in general, and in particular consumer involvement as it relates to cancer.
- Knowledgeable about basic cancer-related scientific terminology.

The contractor will serve as a Curriculum Coordinator to advise and direct OLA staff and the Training Planning Group in arranging predetermined content into effective learning modalities and sequence. It is imperative that the Contractor can work well in a supportive role in the curriculum design process. The Contractor must be willing to work in support of a project that belongs to OLA and the Training Planning Group they are advising.

2. Training Facilitator

In order to ensure that the CARRA Pilot Training proceeds according to schedule, that attendees are engaged, and that the training workshop runs as smoothly and effectively as possible, a contractor is needed to serve as the Facilitator for the pilot training workshop.

Task Description:

The contractor will act as a Facilitator for the CARRA Pilot Training. The Facilitator will provide a professional and high-energy presence to invigorate the training. He/She will keep track of the training agenda to ensure that all training sessions proceed according to schedule by determining if and when people are ready to move on, and that the training program runs as smoothly and effectively as possible. The role of the Facilitator will be specifically related to the educational training sessions during the 2-day workshop. In the event that the training modalities designed by the Curriculum Coordinator require multiple facilitators for breakout sessions or panel presentations, the Contractor will be responsible for identifying and preparing additional individuals to participate in this role. ■

Deliverables:

- Attend at least one meeting of the CARRA Training Planning Group in person.
- Collaborate with Curriculum Coordinator prior to the training to be familiar with the pilot training schedule and sessions.
- Prepare a detailed plan in advance of the pilot training detailing the role of the Training Facilitator specifically as it pertains to the CARRA Pilot Training. This plan will be provided to OLA staff at least three weeks prior to the training for approval.
- Attend the 2-day pilot training to lead participants through the agenda by acting as a Facilitator for all educational training sessions.
- Keep all instructors and CARRA members on schedule during the training sessions.

- Maintain order by keeping attendees focused on the learning topics.
- Moderate instructor presentations, panel discussions, and/or breakout sessions.
- Lead question and answer sessions by directing questions to instructors and/or panelists.
- Create a safe environment for learning and the free exchange of ideas.
- Deal appropriately with difficult participants and negative feedback.
- Serve as primary Facilitator for all discussion during presentations by providing just enough structure so that personal interaction does not interfere with the learning content.
- Write a final report making observations and recommendations for changes to the role of the Training Facilitator to be considered for any future implementations of the CARRA Training.
- Perform any other responsibilities associated with the role of a Training Facilitator during the 2-day workshop as detailed by the plan provided to OLA prior to the training.

Qualifications:

- Experience and expertise facilitating educational training workshops.
- Ability to generate a written report detailing the role of Training Facilitator for the CARRA Pilot Training.

3. Training Evaluation

The goal of the pilot training is to prepare CARRA members to participate effectively in the NCI grant review process. The pilot must be designed to effectively meet the 6 learning objectives for the training. OLA believes that an evaluation of the training is necessary to assess the success of the pilot. A contractor is needed to develop and conduct an evaluation of the CARRA Pilot Training, including a written report making recommendations for changes and/or modifications to be made for future implementation of the CARRA Training.

Task Description:

The Contractor will conduct an evaluation of the CARRA Pilot Training to provide objective insight and feedback about the effectiveness of the curriculum design and delivery.

Deliverables:

- Develop pre- and post-test materials to assess CARRA members' knowledge about participating in the NCI grant review process before and after attending in the CARRA training program. These materials will be provided to OLA staff at least three weeks prior to the training for approval.
- Develop all evaluation tools for training attendees to assess instructors and training sessions (which will be included in the Training Binder created by the Curriculum Coordinator).
- Develop all evaluation tools for training instructors to evaluate the overall training.
- Attend at least one meeting of the CARRA Training Planning Group via teleconference or in person.
- Attend the 2-day training to help inform any evaluation materials that will be designed and implemented after the training. All stakeholders will be evaluating the training.
- Provide a written evaluation report assessing the outcomes of the training including its effectiveness and recommendations for changes/modifications to be made to the curriculum, instructors, content, and training facilitation methods for future implementation of the CARRA training.
- Provide a brief written summary report of the design and outcomes of the pilot training that will be shared with all CARRA members about one month after the training.

Qualifications:

- Experience in evaluation of training programs.
- Ability to generate a written report detailing evaluation findings and recommendations.

Overall Contract Deliverables:

In addition to the deliverables listed under each task described above, the Contractor will be expected to perform the following tasks:

1. Within 10 business days following the award of the contract, the Contractor will arrange and participate in an initial meeting with OLA to discuss the CARRA training and the needs, parameters, and timeline of the Curriculum Coordination, Meeting Facilitation and Training Evaluation plan. The general purpose of this initial meeting will be an opportunity for the Contractor to clarify information, including the goals and expectations for the Curriculum Coordinator, Training Facilitator, and Training Evaluator.
2. Within 5 business days of the initial meeting, the Contractor will submit to OLA a timeline for all work, including Curriculum Coordination, Training Facilitation, and Training Evaluation, and promptly advise OLA if the timeline needs to be revised.
3. The Contractor will provide written summaries within 2 business days of each meeting with the Training Planning Group, OLA staff, and/or course instructors. These summaries shall (a) summarize discussion, and (b) present recommended next steps for the group and/or individual. If a phone conversation between OLA and the Contractor results in additional assignments, changes in direction or scope of work, or changes that impact the timeline, the conversation shall be considered a meeting and documented in a meeting summary.
4. Provide status reports once a month (monthly) to OLA staff. The status report will include, as a minimum, the work completed during the previous period, the tasks to be completed during the next period, funds spent and funds available in the contract.
5. Manage quality control across all tasks and products.
6. Provide a final report at the end of the contract period (this report is in addition to the reports listed in the task deliverables). The report should be a comprehensive report of the tasks completed by the Contractor, and should contain a list of tasks with the proposed timeline and the actual time tasks were executed, copies of the monthly reports provided to OLA, and a final summary of the work required of the Contractor and the work completed by the Contractor.
7. Provide all documents and data in hard copies and electronically.
8. Allow for at least one, but not more than two revisions to any report submitted to OLA.

Please Note:

- The OLA Project Officer will make all final decisions regarding curriculum design, training facilitation, and training evaluation.
- All recommendations, products, evaluation materials, etc. created by the contractor will become the sole property of the government and will be turned over upon completion of its associated task.
- The Pilot Training Workshop may be videotaped for use by OLA in training future CARRA members.

G. EVALUATION FACTORS

Evaluation Criteria

Technical Factors: (40 points) The vendor must demonstrate a clear understanding of the requirements and tasks in this SOW and provide a clear statement of how they will be performed.

Management and Staff: (20 points) Demonstrate the contractors' ability to perform the required tasks within the timeline provided using a staffing and management plan. Discuss the roles and responsibilities of all personnel related to the project. The vendor must provide a management plan and qualified staff to implement all aspects of the required work. Technical expertise and the ability to design and implement practical solutions are critical. Credentials, experience, and availability for all staff must be presented.

Organizational Experience and Past Performance: (30 points) Demonstrate that the organizational capabilities are available to carry out this Task Order. These duties include, but are not limited to adult learning and training expertise, and program evaluation. The vendor must provide information about past performance on similar projects, including references. It is important that the vendor have a demonstrated record of quality products, completion of tasks within budget and established deadlines, and achieving project goals and objectives. The government is seeking to determine whether the contractor has consistently demonstrated a commitment to customer satisfaction and timely delivery of high quality products and services.

Cost: (10 points) While price is not the most important evaluation factor, proposed prices will be considered in determining the firm that represents the best value to the Government.

TO # NICS-129 **TITLE: Coordinator, Facilitator, and Evaluator for Training Workshop**

PART II - CONTRACTOR'S REPLY: **CONTRACT #263-01-D-0_____**

Contractor:

Points of Contact:

Phone-

Fax-

Address:

TOTAL ESTIMATED COST:

Pricing Method

TOTAL ESTIMATED NUMBER OF HOURS:

PROPOSED COMPLETION DATE:

FOR THE CONTRACTOR:_____

Signature

Date

SOURCE SELECTION:

WE HAVE REVIEWED ALL SUBMITTED PROPOSALS HAVE DETERMINED THIS FIRM
SUBMITTED THE BEST OVERALL PROPOSAL AND THE PRICE/COST IS REASONABLE.

Billing Reference # _____

Appropriations Data: _____

RECOMMENDED:

FAX #

Signature - Project Officer

Date

APPROVED:_____

FAX #

Signature - Contracting Officer

Date

NIH APPROVAL -

CONTRACTOR SHALL NOT EXCEED THE ESTIMATED LABOR HOURS OR ESTIMATED
TASK ORDER AMOUNT WITHOUT THE WRITTEN APPROVAL OF THE CONTRACTING
OFFICER & PICS COORDINATOR

APPROVED:_____

FAX#301-435-6101 Signature –Anthony M. Revenis, J.D., NIH-PICS Coordinator

Date

SEE ATTACHMENT BELOW:

Day 1: Morning: 8:00am – 12:05pm; Lunch: 12:05-1:05pm; Afternoon: 1:05-5pm

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Content	Time Spent
<p>Identify key technical and procedural aspects of the NCI peer review process. (Objective 4)</p> <p>Answer the question: “What is Peer Review at NCI?”</p> <p>Procedural aspects of the NCI peer review process How do reviewers work together before and during the process?</p> <p>Technical aspects of the NCI peer review process</p> <ul style="list-style-type: none"> • What are the obligations for researchers to include minorities/women/children in research? • What are optimal methods for recruitment of minority persons as participants in clinical and population research studies? • What are the rules regarding confidentiality/conflict of interest? • What rules and laws apply to using human tissue for cancer research? • How is scientific merit of a research proposal evaluated and rated? • What are the different types of grants & how scientists apply for them? 	<p>11:05 1 hour</p> <p>12:05 LUNCH 1 hour</p> <p>1:05 1 hour</p> <p>2:05 BREAK 20 min.</p>
<p>Identify the expected roles and responsibilities of CARRA members in NCI program and grant review activities. (Objective 1) and Effectively communicate the cancer needs and concerns of the general public, including those directly affected by cancer (Objective 2).</p> <p>Answer the question: “What is my role as a CARRA member in the NCI peer review process?”</p> <p><u>Roles and Responsibilities of CARRA Members in the peer review process</u></p> <ul style="list-style-type: none"> • What are the expectations of the NCI from consumer advocates? • What is the difference between the collective views of survivors, patients, family members, and persons affected by and at risk for cancer, as opposed to one’s personal experience? • How to read/evaluate grant applications and contract proposals? • How and when to submit questions, comments, forms, and evaluations to the NCI or an advisory group? • What homework to do before coming to the session? • What are the rules for patient protections, and what is the role of the advocate in reviewing them? 	<p>2:25 1.5 hours</p>
<p>Tour of Clinical Center</p> <p>Dinner</p> <p>Homework</p> <ul style="list-style-type: none"> • Review cancer research terminology. • Review material on procedural and technical aspects of peer review and roles and responsibilities of CARRA members to prepare for breakouts/role play on Day 2. 	<p>3:55</p>

Day 2: Morning: 8:00am – 11:30am; Lunch: 11:30am-12:30pm; Afternoon: 1-4pm

Content	Time Spent
Coffee and Breakfast	8:00 30 min.
<p><i>Recognize key concepts and terminology of cancer research (Objective 6).</i></p> <p><i>Answer the question: “What are the key concepts and the terminology of cancer research that I need to know as a CARRA member to effectively participate in the NCI peer review process?”</i></p> <p><u>Key Concepts of cancer research (including terminology)</u></p> <ul style="list-style-type: none"> • Experimental designs and procedures • Translational research (i.e. translating research findings from the lab to the clinic) • Types and designs of clinical trials • Basic scientific concepts <ul style="list-style-type: none"> ○ Cell biology and genetics. ○ Epidemiology/statistical methods. • Drug development process <ul style="list-style-type: none"> ○ Prevention vs. treatment drugs. ○ Role of private industry and pharmaceutical companies in drug development. • Cancer stats • Clinical trials info <ul style="list-style-type: none"> ○ How are clinical trials made available to the public? ○ Consent forms and consent laws. 	<p>8:30 1.5 hours</p> <p>10:00 BREAK 30 min.</p>
<p><i>Identify appropriate resources for locating current information on key cancer concepts (Objective 5)</i></p> <ul style="list-style-type: none"> • Tips for finding information. • Tips for distinguishing “popular press” coverage of research results (misinterpretation of conclusions). • Media coverage of research as it applies to appropriate and responsible coverage of a study. 	<p>10:30 1 hour</p> <p>11:30 LUNCH 1 hour</p>

Content	Time Spent
Peer Review Role Play	12:30 2 hours
<p>Concluding Remarks</p> <ul style="list-style-type: none"> • Talk about “Next Steps” <ul style="list-style-type: none"> ○ What do I do now? ○ When will I be called to participate? ○ What kinds of “review materials” are available to me? ○ How can participants promote CARRA program among constituents? ○ How can CARRA members spread NCI information to constituents? • Distribute Training Evaluation • Feedback on CARRA Program • Update on current CARRA initiatives 	2:30 1.5 hours

Possible course materials:

- Everything you wanted to know about the NCI Grants Process.
- The packet they would get before participating in a peer review.